

# Post-Implementation Report

## PROJECT IDENTIFICATION

Project Name: TANF Diversion

Date: 11/06/2006

Project Sponsor: TANF/Blaine Nordwall and Carol Cartledge

Project Manager: Kevin Janes

Report Prepared By: Kevin Janes

**CATEGORIES:** Categories of the report correspond to the categories in the Post-Project Survey.

For each category, the Overall Rating is the average of the ratings provided on completed survey forms for that category (1=Not at All, or Poor, 2=Adequately, or Satisfactory, 3=To a great extent, or Excellent)

## Executive Summary

TANF Diversion was a project that was mandated by the Department of Human Services based on Federal Regulations. It was very important that we met the implementation dates of August for Phase I and October for Phase II, because we could have lost Federal monies if these dates were not met. Phase I was the more important of the two since the workers needed the changes in production to work the cases. Phase II dealt with a lot of reports and other less critical changes dealing with reports etc.

We finished the project on time and under budget. The quality of the project was very high and a minimal number of problems occurred due to these changes. The problems that did occur were easily corrected and completed within a very short period of time.

We held a Close out meeting with Policy, ITD programming, SSD Helpdesk, the ITD project manager as well as myself acting as the Department of Human Services Project Manager. People in the meeting indicated that they were very pleased with the project and many believed that this one ranked near the top as far as how smoothly it ran. Everyone agreed that it was a team effort and due to the aggressive time frame of this project, there was not much room for error. We had to minimize mistakes or the project would not have met the deadline.

This project was a success because of the following:

- Management bought in to this project. They devoted their time and effort in making this project a success. They were willing to make quality decisions in a timely manner and this allowed the project to stay on track. There was very little scope creep. All these factors helped the project finish on time and under budget.
- ITD did a very good job of providing information to management in the design meetings and was able to get the details worked out during design. By doing this, the system was programmed properly and changes were kept to a minimum after design was complete. ITD also dedicated the right amount of staff for this project and their staff was able to fix problems very quickly. This also was crucial for the project since we were on such a tight time schedule.
- SSD was involved from the start of the project. They were in the initial design meeting and provided the acceptance testing of the project. They dedicated staff to the project and were very instrumental in the success of the project.
- DHS Information Technology Services (ITS) was involved with this project. They created a better method of testing that was more thorough and reduced the possibility of testing errors when running the batch processes. ITS also had a project manager that coordinated weekly status meetings to ensure the project was on track.

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## A. PRODUCT EFFECTIVENESS

The following were identified as business needs of the Diversion Project and were implemented with the project:

- The law states that individuals can only be on Temporary Assistance for Needy Families (TANF) for 60 months except for very special circumstances. TANF Policy required that a Diversion Assistance case would be excluded from this 60 month limit. We modified our software application so that Diversion cases would not be counted towards the 60 month limit and thus accomplished our business objective.
- We are able to track the number of families and children who are enrolled in diversion cases by looking at data stored in the databases for any given month. We are then able to track how many of these cases become TANF Assistance Clients or leave assistance within 2 months after leaving diversion. Diversion Cases can be identified and tracked in our system, but it will take a number of months to measure real trends relating to the implementations of the diversion assistance program.
- Diversion Assistance cases are not referred to Child Support. Child Support monies received by the family determined the amount of the TANF Diversion benefit. The system was programmed to meet this business need.
- Our original business need stated that a referral to Job Service was voluntary. Policy made the decision that they did want to refer Diversion cases to Job Service so we modified our application to send the referral automatically to Job Service.
- A referral to North Dakota Health Tracks is voluntary so the application does not send the referral.
- A Diversion Assistance Case is not included on the Federal TANF report. To accomplish this we modified the program that sends information to the Federal Government to exclude diversion cases.
- In the project charter we stated that the modification to the VISION Software application needed to be completed by August 4<sup>th</sup> in order to meet Federal Requirements. We met this goal and thus did not lose federal monies.
- The Information Technology Department (ITD) did a system test and System Support and Development (SSD) did a more thorough test to ensure the system was working properly before releasing this to the state eligibility workers. By performing these tests and correcting errors before going live, we were able to make the system perform the way it was intended and were able to provide a high quality product to our end users.

Overall Survey Rating: 3

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## B. CSSQ MANAGEMENT

There were very few scope changes in this project and this helped us stay on schedule. The SSD helpdesk developed a very detailed testing plan to ensure the system was working the way it was designed to work. The problems that were discovered were written up as problem logs in the Work Management System (WMS). ITD would

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correct the problems and send them back to the SSD helpdesk to be retested. When SSD was satisfied with the changes, they would close the problem log and continue their test plan. Because of these procedures, problems were identified, fixed and retested in an efficient manner and the quality of the product improved. The project schedule never changed and neither did the budget. These procedures worked very well for us and I would make sure to use the WMS problem logs in future projects.

Overall Survey Rating:3

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## C. RISK MANAGEMENT

Our biggest risk in this project was the project schedule. We had to meet an August deadline and we had to minimize risks and delays. These are some of the ways we reduced/managed risk:

- Human Services and ITD emphasized the importance of this project and allocated adequate human resources to this project. Management made this project a very high priority and made it clear that stakeholders had to be available and responsive to the needs of the project.
- We had a clear understanding of what was needed in our project. The scope was solid and we had a few minor changes. We knew that we had to get things done right the 1<sup>st</sup> time and did not have the luxury of changing scope etc.
- We held the majority of the meetings early in the project. This allowed us to identify issues and respond to them quickly. We brought in all the stakeholders early in the project and also gave them the testing schedule in advance. This allowed them to arrange their schedules so that they could be available when needed.
- In previous TANF projects, we would run the jobs/programs manually to test the application. This process was slow and had a potential for errors and the users feared that these errors could jeopardize the project. Child support used a method that allowed these jobs to run in succession and much more quickly, so we adopted this for our project. By doing this, we were able to run tests more often and more efficiently. This change had a very significant effect on testing and thus on the project.
- We brought in two county users to help us in testing. They had some very good ideas that made our product better. We were able to complete our testing faster and at the same time these users bought in to our system since they had a voice in the end product.
- When we found problems, we wrote up a problem log to ITD. This worked much better than phone calls or emails since it was documented in the project. By doing this, we had a procedure for correcting these problems and having the documentation that verified the problem was corrected.

Overall Survey Rating:3

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## D. COMMUNICATIONS MANAGEMENT

The communication in this project was excellent. The Work Management System was used and as a result, everyone was able to follow the project very easily. We started out by having multiple design session and when issues came up, policy was able to make

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decisions quickly and this allowed the project to stay on track. ITD accepted calls daily with questions/adjustments by policy and SSD and did an excellent job at solving/giving solutions to various situations. We had a weekly status call that identified and caught any problems/concerns and helped us meet our scheduled rollout to production.

Overall Survey Rating: 3

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## E. ACCEPTANCE MANAGEMENT

ITD provided 130 different sets of minutes that policy and SSD approved. Once these were approved, ITD went in and created design specifications and programmed the agreed upon specifications into the application. Once they coded the changes, ITD ran tests to see if the changes were working the way they were supposed to run. SSD created test scenarios before ITD had done their programming. Once ITD had coded and tested their changes, SSD then entered the test cases and verified that they were obtaining their expected results. When a problem was found, SSD created a problem log and then ITD fixed the problem and SSD retested to make sure the changes met their satisfaction. When the problem passed SSD's criteria, the problem log was closed and SSD continued with their testing.

**Overall Survey Rating:** 3 - We received positive feedback from the Policy people, SSD and ITD on the method that the project sponsors approved minutes and the results of the tests. Because the planning phase was so smooth, we had very few scope changes and the testing went very well and the project kept on schedule.

The project team realized that with the tight schedule, everyone had to be very responsive otherwise the project finishing on time would be in jeopardy. Because everyone knew that management viewed this project in this manner, they made sure that they responded quickly to the needs of the project.

## F. ORGANIZATIONAL CHANGE MANAGEMENT

The biggest change that we saw was the commitment, of all parties, including management to a successful project. Everyone came to the table committed on getting the project completed on time and within budget. The August deadline made it clear to us that we had to make sure that we all worked together and that we had little room for error. As a result everyone focused on the main goal of the project and did not try to change the scope of the project.

Overall Survey Rating: 3

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## G. ISSUES MANAGEMENT

We did not have any major issues in this project. There were 7 minor issues created in the Work Management System. The issues were addressed and decisions were made and the project went forward in a timely manner.

Overall Survey Rating: 3

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## H. PROJECT IMPLEMENTATION AND TRANSITION

We had 2 major milestones that needed to be met. The 1<sup>st</sup> phase had to be coded, tested and rolled out to production in August. If we missed this goal, federal funding would be lost. The second phase had to be rolled out in October and we were actually ahead of schedule in this phase.

Overall Survey Rating:3

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## I. PERFORMANCE OF PERFORMING ORGANIZATION

DHS and ITD did an excellent job on this project. Both agencies allocated the appropriate resources on the project and the people outside the project team were very responsive when they were needed. We were able to let these people know when and what we expected them to do weeks before they had to do their tasks. This was a true team effort!

Overall Survey Rating:3

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## J. PERFORMANCE OF PROJECT TEAM

This project succeeded because of the fact that everyone worked as a team. Policy was able to give very specific criteria for the project and made decisions very quickly and did not try to change the scope of the project. ITD did a magnificent job of defining the program changes needed to make the project successful. System Support and Development (SSD) was involved thru the whole process and was in charge of creating test cases and criteria and make sure that the changes performed by ITD were correct. We brought in a 2 county workers to help with the testing since SSD was short on resources. By using these county workers in testing, it helped to get the counties to buy-in and accept these changes. We also had finance, research and statistics as well as child support personal involved in testing the application since they were stakeholders in this project.

Overall Survey Rating:3

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## K. KEY PROJECT METRICS

### COST

Final Cost	Final Approved Baseline Cost Estimate	Difference from Final Cost	Original Cost Estimate	Difference from Final Cost
\$146,701.00	\$244,972	\$98,271	\$241,168	\$94,467
		%		59.88%
Number of approved changes made to the original budget.				1
Number of "re-baselined" budget estimates performed.				0

The great team effort and detailed analysis/planning allowed us to eliminate the need to expend much of the risk contingency funding. It also helped us complete tasks in less time than anticipated, reducing costs and keeping us on schedule.

### SCHEDULE

Number of milestones in baseline schedule.	12
Number of baseline milestones delivered on time (according to last baselined schedule).	12
Difference in elapsed time of original schedule and final actual schedule.	0
Difference in elapsed time of final baseline and final actual schedule.	0

We met all milestones on this project and were actually ahead of schedule on this project for some of the deliverables. As mentioned earlier, the schedule was so aggressive that we had virtually no room for error otherwise the schedule would have been compromised.

### SCOPE

Number of baseline deliverables.	5
Number of deliverables delivered at project completion.	5
Number of scope changes in the post-planning phases.	0

We were required to have TANF Diversion in Production by August/2006 in order to keep all of our Federal Funding. TANF allows an individual to receive benefits for a total of 60 months except if the client is on Diversion. We had to make sure that Diversion cases did not get counted toward the 60 month total or reported to the Federal Government. Diversion cases are being referred to Job Service but are not being referred to Child Support Enforcement. This project was completed on time and under budget and was tested to ensure the system functioned as required.

### QUALITY

Number of defects/quality issues identified after delivery.	0
Number of success measures identified in the Business Case that were satisfied or achieved at project completion.	5

Minor report problems were handled as we found them and were quickly fixed. See section A, "Product Effectiveness".